

TO: Distribution

DATE: December 13, 1994

FROM: Marketing Information & Analysis / David Burrows

SUBJECT: INTEGRATED WEEKLY NIELSEN REPORT-WEEK ENDING 11/26/94**SUMMARY**

- PM's weekly share experienced its third consecutive weekly gain, up +0.8 points during this period to 46.4%.
- American's Discount four week share was up +0.2 points versus the prior four week period to 3.4%, primarily driven by American PL and Montclair.

KEY FINDINGS**All Outlets Combined**

- PM experienced its third consecutive weekly gain, up +0.2 points versus week-ago and +0.8 points over the last three weeks to 46.4%, with positive performance in c-stores and each of the scanning trade classes (driven primarily by OPB). However, the company's four week share was off -0.1 point versus the prior four week period to 46.0%, with Basic and PM PL losses more than offsetting OPB and Cambridge advances.
- Marlboro's share was stable on both a weekly (29.4%) and four week (29.1%) basis. The brand's positive performance in drug and mass merch outlets offset a decline in c-stores, while the franchise was stable in supermarkets.
- PM OPB's weekly share gained +0.2 points versus week-ago to 9.0%, while its four week share was up +0.1 point versus the prior four week period to 8.9%. PM Discount's share (8.0%) was stable week-to-week, while off -0.2 points versus the prior four week period, with Basic and PM PL declines partially offset by Cambridge's increase.
- RJR's share declined -0.2 points on both a weekly (28.4%) and four week (28.7%) basis. Winston and Best Value accounted for the week-to-week loss, while declines by the company's premium and discount franchises influenced four week performance.
- American's Discount share (3.4%) was stable week-to-week, while its four week share gained +0.2 points versus the prior four week period with the increase driven by American PL and Montclair.
- The Discount category's weekly share gained +0.1 point versus week-ago to 30.6%, primarily driven by GPC. However the category's four week performance was off -0.2 points versus the prior four week period to 30.7%, with both the Private Label and Branded Discount segments each experiencing losses.

Convenience Stores

- PM experienced its second consecutive weekly share gain, up +0.2 points versus week-ago and +0.5 points during the latest two weeks to 47.4%, with week-to-week advances by OPB and Cambridge partially offset by Marlboro's loss. However, PM's four week share declined -0.3 points versus the prior four week period to 47.1%, with Marlboro accounting for the majority of the loss.
- Following two consecutive week-to-week share gains, Marlboro's weekly share declined -0.1 point versus week-ago to 31.8%, while its four week share was off -0.2 points versus the prior four week period to 31.6%.
- RJR's weekly share was off -0.2 points week-to-week to 28.0%, with Winston accounting for the majority of the loss. The company's four week performance was stable at 28.1%, as gains by Doral, Salem and RJR PL offset losses by Camel, Monarch and Best Value.

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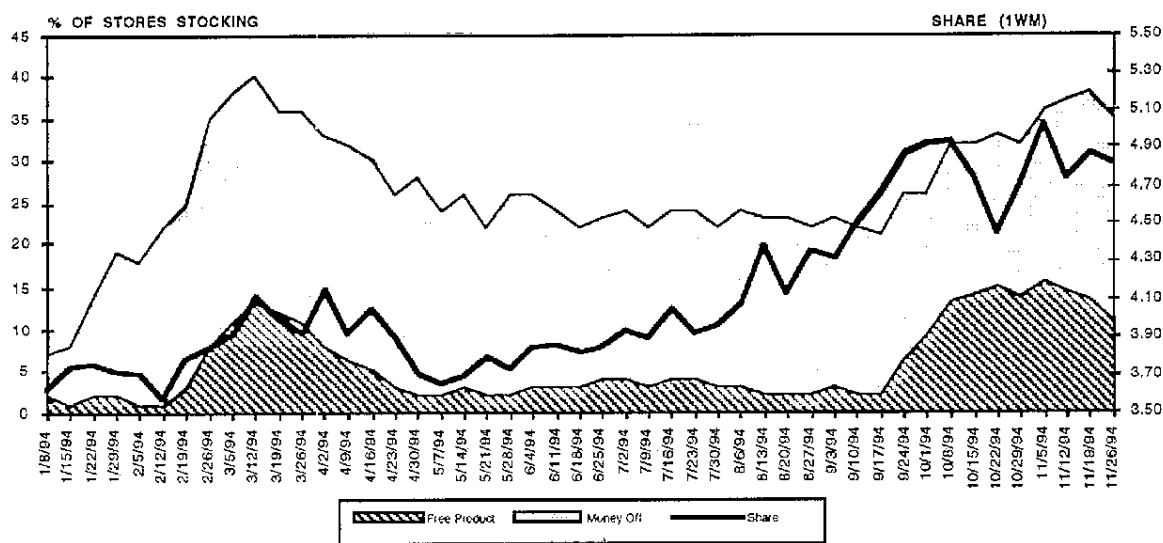
Convenience Stores (Cont'd)

- The Discount Category's weekly share gained +0.3 points versus week-ago to 31.8%, with American PL, Monarch, GPC and Cambridge advances more than offsetting losses by Doral. On a four week basis, the category experienced a -0.1 point loss versus the prior four week period to 31.7%, as declines by PM and Liggett PL, Basic, Best Value and Monarch more than offset gains by RJR and American PL, Doral and Montclair.

Emerging Trends

- With the exception of flex fund activity, Marlboro's promotional support continued to decline, as the percentage of c-stores with a Marlboro free product offer declined to 4%, while incentive incidence decreased to 7% of c-stores.
- Basic's promotional support also continued to decline, as the percentage of stores with a free product offer fell to 6% of stores, while incentive incidence was down to 11% of c-stores.
- Winston's incentive incidence advanced +3 points week-to-week to 10% of c-stores, while its money-off deal activity expanded +6 points over the last three weeks to 35%.
- The percentage of stores with a Camel free product offer (primarily B2G2F) declined to 5% of c-stores this week, while money-off deal activity remained relatively high at 28% of c-stores.
- Doral's free product activity (primarily B2G1F) declined -3 points versus week-ago to 12% of c-stores, while money-off incidence remained near its year-to-date high at 26%.

DORAL PROMOTIONAL INCIDENCE
CONVENIENCE STORES

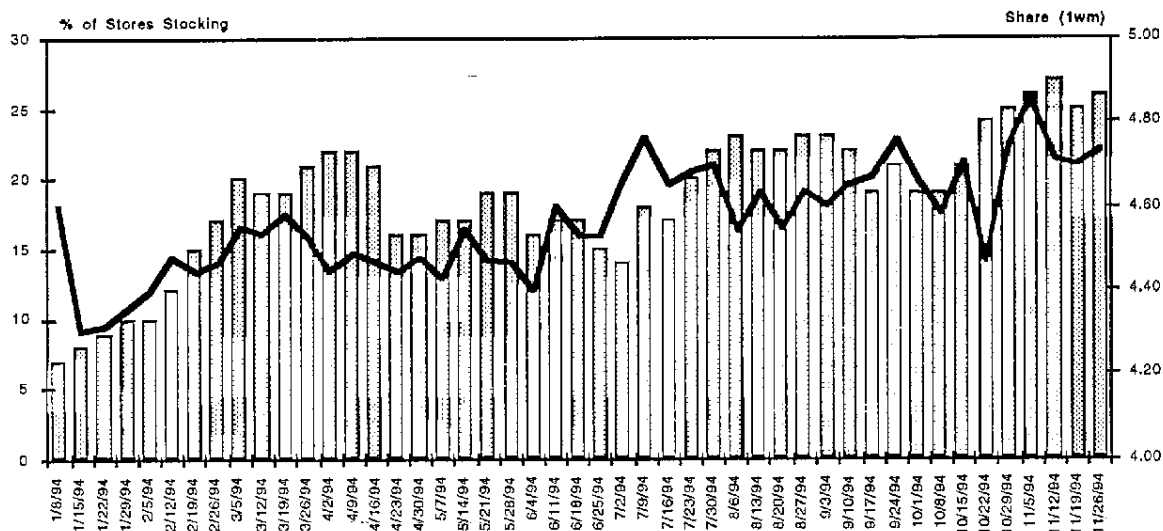


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Emerging Trends (Cont'd)

- Newport money-off deal incidence (primarily IRC's valued at 26¢-50¢) remained near its year-to-date high at 26% of c-stores this week, with activity concentrated in Regions 3 (32%) and 4 (33%).

NEWPORT PERFORMANCE
MONEY-OFF INCIDENCE VS. SHARE



Distribution:

C. Abbruscato	G. Fawcett	E. Joyce	M. Moore	T. Saloun
P. Amerson	P. Fernandez	M. Joyce	J. Moose	M. Schroeder
R. Anise	R. Ferrin	T. Keim	J. Morgan	B. Schuyler
M. Anton	C. Finch (R3)	F. Kelly	J. Mortensen (R5)	C. Schwab
T. Beane	S. Fuller	J. Kiemen	M. Murphy	A. Schwartz
D. Beran	L. Funes	S. Kirkman	W. Murray	B. Shah
D. Berenson	G. Galanti-Bennis	L. Lembo	B. Neidle	R. Simons
G. Bible	T. Garguilo	S. LeVan	D. Nelson (R1)	A. Sinha
B. Bittner	E. Gawronski	C. Levy	J. Nelson	W. Smith
G. Blumenenson	E. Gee	B. Lewis	S. Norris	J. Spector
J. Bonhomme	H. Glastein	J. Lichtman	C. Norrington	D. Stern
W. Campbell	A. Goldfarb	H. Long	S. O'Brien	N. Suter
J. Chaump	M. Gordon	H. Lu	N. Parmet	M. Szymanczyk
J. Clary (R2)	R. Gordon	L. Lubrano	V. Penninti	C. Tucker
C. Cohen	J. Greene	N. Lund	S. Piskor	J. Turner
D. Cohen	P. Henriques	M. Maggio	M. Platteter	A. von Germeten
N. Conrad	D. Himmel	M. Mahan	D. Potter-Hogg	M. Waldman
G. D' Alessandro	B. Hopkins	J. Margolis	R. Potts	R. Webster
S. Darrah	K. Houghton	T. McGovern	S. Rafferty	B. Weinstein
J. de Castro	A. Hyland	R. Mikulay	T. Rehm	L. Wexler
P. Dodd	D. Ince	D. Miller	T. Resman	R. Whalen
G. Eastburn	J. Isaacs	J. Miller	J. Ricks	H. Willard (R4)
K. Eisen	S. Jannetta	K. Miller	R. Robinson	
N. Ellis	C. Johnson	S. Minagawa	S. Rush	

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